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ABSTRACT

Methodologies for evaluating/documenting partnership programs are analyzed and options for evaluating/documenting OERI's Educational Partnerships Program (EPP) are proposed. The EPP supports alliances between public schools and/or higher education and the private sector to encourage excellence in education. This paper reflects discussions/recommendations of the EPP Study Group, which met in Washington, D.C. in November-December, 1990. A two-part discussion is provided, which begins with a brief summary of the EPP's purpose and the characteristics of the 18 partnership projects funded in mid-1990. The second part discusses the proposed evaluation options. Options covered for Program Year One (1990-91) include: setting up a systematic tracking system; setting up program files; keeping contact logs by sites, and conducting structured phone interviews. Options covered for Program Year Two (1991-92) include various evaluation start-up activities; providing either project-based formative evaluations or documentation of project implementation; preparing project-based summative evaluations; and preparing a summative evaluation of the overall program. Options covered for Program Year Three (1992-93) include ongoing evaluation design, and site profiles. Formative versus summative approaches, quantitative versus qualitative data collection, and advantages versus disadvantages of various options for each of the three years of the EPP are explored. (RLC)

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OPTIONS FOR EVALUATING THE EDUCATIONAL PARTNERSHIPS PROGRAM 1991-1993

Prepared for the Educational Partnerships Study Group

by Education Resources Group, Inc.

January, 1991

TM016066

Preface

The U.S. Department of Education's Office of Educational Research and Improvement (OERI) funded the first cycle of four year projects under its new Educational Partnerships Program in September 1990. The Educational Partnerships Program is authorized by the Educational Partnerships Act of 1988, Title VI, subtitle A, Chapter 5 of the Omnibus Trade and Competitiveness Act of 1988 (Pub. L.100-418) (20 U.S.C. 5031-5039). This legislation also requires the Secretary to conduct an annual evaluation of the grants made under the program and to disseminate information relating to the activities assisted.

In performing the evaluation and dissemination responsibility, OERI has attempted to design its activities to build on what already is known, and to expand knowledge about the characteristics of effective partnerships and how to establish, sustain, and evaluate them. In order to establish a baseline for future work, assess what already is known about educational partnerships, and review potential evaluation design options, OERI commissioned the following analyses and syntheses:

Danzberger, Jacqueline P., "EDUCATIONAL PARTNERSHIPS PROGRAM: ANALYSIS OF PROJECT CHARACTERISTICS," December, 1990.

Education Resources Group, "AN OVERVIEW OF EVALUATION RESEARCH ON SELECTED EDUCATIONAL PARTNERSHIPS," January, 1991.

Education Resources Group, Inc. "OPTIONS FOR EVALUATING THE EDUCATIONAL PARTNERSHIPS PROGRAM," January, 1991.

Grobe, Terry and Susan P. Curnan and Alan Melchior, "SYNTHESIS OF EXISTING KNOWLEDGE AND PRACTICE IN THE FIELD OF EDUCATIONAL PARTNERSHIPS," December, 1990.

This is one of the four commissioned reports. All four are available through ERIC.

INTRODUCTION

Education Resources Group (ERG) was contracted by OERI to prepare an analytic review of methodologies for evaluating and documenting partnership programs and to propose options for evaluating and documenting the Educational Partnerships Program. Within this broad scope of work, ERG was asked to discuss particular issues (e.g., partnership "settings" and student outcomes) and to delineate formative versus summative approaches, quantitative versus qualitative data collection, and the pros and cons of the various options. This document reflects discussions and recommendations of the Educational Partnerships Program Study Group, which met in November and December, 1990.

The evaluation will serve at least three key audiences, including (1) the Legislature, which authorized The Educational Partnerships Program through the Educational Partnerships Act of 1988, (2) interested parties planning to become involved in educational partnerships, and (3) the general public. The evaluation should look at how the partnership affects outcomes in each site, as well as the extent and significance of outcomes themselves. These purposes indicate the need for both process and outcomes studies.

The two-part discussion which follows begins with a brief summary of the purposes of the Educational Partnerships Program and the characteristics of the 18 projects funded in mid-1990.

Understanding how the projects differ and are similar will help the reader assess the various evaluation options being proposed, and potential limitations of the evaluation in general.

The second part is a discussion of proposed evaluation options. Each option will be described, and assertions will be made about the relative usefulness, benefits, and disadvantages of pursuing them. Within each option, only broad parameters are suggested, enough to give the reader a working understanding of how the option could be carried out. It is not the purpose here to specify a final evaluation plan.

The partnerships evaluation will begin formally as the initial 18 projects go into their second year of operation (fall, 1991). OERI encouraged projects to keep records and track activities when staff from all projects met as a group in Washington, D.C. in December, 1990. These activities will be useful for evaluators as they begin work this fall. They will also be critical for the projects as they design, plan, and carry out their own evaluations, which are required by OERI.

THE EDUCATIONAL PARTNERSHIPS PROGRAM

The goal of the Educational Partnerships Program is to support alliances between public schools and/or higher education and the private sector "to encourage excellence in education."

Alliances can be developed for the following purposes:

(1) to apply the resources of the private and nonprofit sectors of the community to the needs of the elementary and secondary schools or the institutions of higher education in that community to encourage excellence in education;

(2) to encourage businesses to work with educationally disadvantaged students and with gifted students;

(3) to apply the resources of communities for the improvement of elementary and secondary education or higher education; and

(4) to enrich the career awareness of secondary or postsecondary school students and provide exposures to the work of the private sector.

Under these general purposes, partnerships might focus on: statewide policies and initiatives; staff training; exposure to the work world of businesses, agencies, and other organizations; mentoring, tutoring, and/or internships; and various forms of voluntarism.

Selected Projects

OERI received 325 partnership proposals, which were reviewed by 100 panelists in August, 1990. Eighteen projects around the country were awarded first-year grants ranging from $62,000 to $325,000; over $3.6 million were awarded.

Most of the projects are establishing new alliances, although several are setting up an "umbrella" structure to coordinate existing alliances. One project is an extant

statewide alliance. Highlights of characteristics of the 18 projects are listed here.

- Half the projects will be carried out at the school level, including one that is statewide and one that is regional in scope.
- Levels of schooling addressed by the project are mixed. For example, while five are at the secondary school level, four cover K to 12.
- The variety of partners is rich: five projects include the private, university, community, and parent sectors, four involve businesses primarily, and the remaining half include one or two of these sectors.
- Eight projects target disadvantaged, at-risk students, and four will work with both at-risk and gifted students. Six will serve "all" students in the school, district or state.
- Half the projects will focus on career awareness/work experience activities. Ten plan some form of staff development. Eleven will include tutoring, mentoring, internships, and/or volunteer work. (These were key program purposes or recommended activities.)
- About a third are focusing on math/science and/or technology as a theme.

Project-Based Evaluations

OERI's request for proposal required an evaluation design to be included in project plans. These designs were in general very basic; many of the projects did not even name the evaluator. Key features of the evaluation designs are summarized in Table 1.

Three projects proposed to secure an "external" evaluator; two others actually named third-party evaluators. Six projects have either a project partner or the organization administering

Table 1. Project Evaluation Plans

	# of Projects
Evaluator	
1. Evaluator not named	7
2. Implementor as evaluator	3
3. Partner as evaluator	3
4. "External" evaluator to be named	3
5. Third-party evaluator named	2
	18
Evaluation Focus	
1. Program implementation/student outcomes	8
2. Program implementation only	6
3. Student outcomes only	3
4. Teacher outcomes	1
	18
Other Notable Characteristics	
1. Evaluation of overall partnership development	6
2. No listing of possible "outcome" measures	8
3. Using a student comparison group	3

the grant evaluating the program. Seven projects did not name an evaluator in their proposals, although many of these have selected one by this time.

The proposed project-based evaluations in general focus on the program being implemented (6), student outcomes (3), or both (8). One project plans to evaluate teacher outcomes. Three plan to use student comparison groups.

Implications for Evaluation

Projects' partnership focuses are in general more homogenous across the board than might have been expected. Enough variation exists, however, to make problematic the implementation of an all-project summative evaluation. Individual project objectives and targeted groups differ, for example, in emphasis on students versus staff, the development of the alliance versus changes in student behavior, and reform in school buildings versus district-level or statewide reforms. These variations limit the evaluator's opportunity to study across-the-board outcomes for students, staff, or partners. They suggest project-by-project assessments, at least for specific project activities. These could be done by the projects themselves, with technical assistance and monitoring by the evaluator. They could alternatively be done by the evaluator, who would essentially be conducting 18 individual evaluations.

To study the more general development of partnerships and implementation of partnership activities, a systematic documentation/process evaluation can be designed. The evaluator might choose to 1) study each project, 2) group projects by common focuses (e.g., "statewide" initiatives, gifted students, math/science theme) and then select one or two projects in each group for in-depth study, or 3) randomly select six to nine projects for intensive documentation (which includes a series of project visits as a framework for data gathering) and designate the remaining projects as non-intensive (meaning they would be subject to a subset of data collection activities conducted at intensive projects). Variations on this across-the-board assessment would affect formative versus summative approaches, quantitative and qualitative data collection, and the relative costs of each approach.

OERI expects the projects to receive feedback from the evaluator during the course of project implementation. This points to formative evaluation or documentation, both of which are designed to help projects make mid-course corrections, revise objectives, and ultimately improve project outcomes.

These issues and approaches to evaluating the Educational Partnerships Program are discussed more fully on the following pages.

EVALUATION OPTIONS FOR EDUCATIONAL PARTNERSHIPS PROGRAM

Program Year One, 1990-91

No formal evaluation will be conducted for this program in its first year: a contract will be awarded in time for evaluation to begin with year two. This means the evaluator must pick up on 18, year-old projects and begin with a handful of new projects OERI hopes to fund in 1991-92.

It also means that projects must be asked to begin systematic record keeping, and where possible, to set up data bases for outcomes measures. OERI has asked projects to set up such systems as soon as possible to ensure routine, in-house data collection. This can happen in a number of ways.

1. Once outcomes are operationally defined (e.g., retention rates as a measure of dropout status, choice of high school courses as a measure of career awareness), data should be kept on groups for which behavior changes are expected. Because the 18 projects vary in focus on outcomes -- ranging from changes in statewide policy to changes in student math and science scores -- a list of outcome variables should be developed for each participating group. For example, projects focusing on student outcomes should routinely

keep student/staff files with such variables as program entry/exit, attendance, relevant test scores, credits earned, hours of work experience, etc. In doing this, projects will be "tracking" project participants' behavior over time.

2. Projects should also set up and maintain files which contain the project proposal, correspondence, activity information, meeting agendas and minutes, and other relevant documents. This will assist the contracted evaluator and the project in constructing/understanding project history. It will provide the framework for an "institutional memory" about the project.

3. Contact logs should be kept by key partners and project staff. These can be simple, one-page forms on which decisions and important communications are recorded for program files. Copies of the form can be kept near the phone and completed by hand as the contact is occurring. These logs become records in themselves of program implementation, and can be used to recall, clarify, and order program decisions/events.

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4. At least once during 1991, structured phone interviews could be conducted with the director and key partners

of each project. This will provide a snapshot of implementation status, start-up issues, concerns, obstacles, decisions, modifications, etc. OERI staff may want to develop a list of interview questions and conduct the interviews themselves, or let a small contract to an external group to develop the interview form, conduct interviews (probably three or four, 45-minute phone interviews per project), and write them up for program files. If this is not possible, the contracted evaluator might do this task as an initial step in getting up-to-speed on project activities next fall.

Program Year Two, 1991-92

Evaluation Start-up Activities

A number of start-up tasks will facilitate the evaluation effort. The evaluator must take inventory of partnership progress and accomplishments during year one, the status of record keeping and program files, key modifications in project goals and objectives, staffing patterns, etc. (Project continuation proposals to OERI will include a first-year report, which the evaluator might use as a framework for this inventory.)

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These start-up activities might include an initial or follow-up round of phone interviews (costing between $6,500 and $8,500) or a round of visits to each project to meet staff and review program files and data bases in-person.

The long-term benefits of at least one round of project visits are clear. Project staff meet a real person who is conducting an evaluation. The evaluator meets more partnership participants than he/she might encounter at annual all-project gatherings. The evaluator can see first-hand project files, record keeping systems, and data bases. A meeting can be used to assist project staff in clarifying goals and objectives, refining their own evaluation designs, and understanding the scope, requirements, and expectations of the larger evaluation. Some of these tasks could be accomplished over the phone or through exchange of written materials, but the project visit can solidly set the stage for formative evaluation or documentation, and summative evaluation.

The evaluator would systematically take into account each project's goals and objectives, proposed year-two activities, status of record keeping and data base systems, and strengths and weaknesses in implementation. A subset of projects might be visited instead; although this would reduce costs, it would be difficult to decide which projects would not get visits.

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Project-Based Formative Evaluations

One approach to evaluating the partnerships would be to provide a formative evaluation for each project. The purpose of this would be to collect data at strategic points during program implementation, analyze them, and feed back information to project staff so they can make mid-course corrections, modifications in program plans, and adjustments in level and use of resources.

Two benefits of this approach are that 1) findings can help place summative results in context, and 2) OERI can be apprised of problems while there is still time to address them. Formative evaluation is a very useful and efficient way to study a program when it is not possible to visit the program regularly. A variety of data collection instruments can be developed or adapted to assist the evaluator in efficiently gathering data "long-distance."

Formative evaluation of individual projects can focus on program implementation process and/or specific objectives and activities in each. The evaluator and project leaders can jointly identify key program components and events (e.g., a cycle of career awareness/work experience activities, teacher training

in use of multi-media technology, and partnership decision making strategies), develop operational definitions, performance indicators, outcomes benchmarks, etc., and decide on data collection methods to learn about the component or event. Data collection methods might include interviews, surveys, criterion-referenced or achievement tests, attitudinal scales, participant feedback after key events, observations, and participant-focused, program-provided data.

For example, a few projects plan to provide technical assistance to schools participating in partnership-sponsored activities. Technical assistance must be defined, records of service provision kept, types of services described, and user reactions to services solicited. The evaluator could analyze the usefulness of technical assistance and provide focused feedback about this at strategic points during the project. This would alert the project to its needs and reactions to technical assistance; it would also provide recommendations to OERI for provision and use of technical assistance services for the other projects.

Conducting formative evaluation for each project can be time consuming. Done properly, the task involves customized data collection at strategic points for each project. A variety of data collection instruments -- such as attitude and knowledge scales, surveys, and feedback forms -- would have to be developed

and administered. Data collection would result in written or verbal feedback to the projects, which takes time to prepare. If project staff do not have analytic capability, the evaluator may have to assist in statistical analyses as well.

A basic formative evaluation might include the following set of activities for any given project:

- distribution of one or two questionnaires to project partners during the year -- questions can be focused on key project objectives and activities, the partnership process, and perceptions of program quality and efficacy;
- at least three rounds of structured phone interviews with several key project partners to get updates on project activities;
- collection and analysis of attitudinal and knowledge assessments completed by students, teachers, and parents, who are the primary recipients of project services in most projects;
- when possible, observations of key project events, such as a partnership meeting, a training session, or a career awareness activity;
- a review of program materials recording project activities, decisions, and participation patterns;
- review of outcomes data as they are collected throughout the year; and
- verbal or written feedback mid-year and at the end of the school year.

The cost of such an effort depends on 1) the evaluator's ability to use standardized data collection forms (e.g., for phone interviews), and 2) degree of record-keeping sophistication at the project level.

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Documentation of Program Implementation

An alternative to formative evaluation, which focuses on specific project components, is documentation, which focuses on project implementation. Studying how a program is implemented serves several purposes. First, it indicates whether or not the program is actually pursuing stated goals and objectives. Second, it suggests how implementation processes -- e.g., activities, interactions, and decisions -- are affecting accomplishments and changing project direction. Third, it helps to build an institutional memory so program developers and implementors learn from successes and failures.

The documentation process is dynamic and evolutionary. It provides for continuous data gathering (in contrast to pre-post measures of change found in a more traditional formative evaluation), a systematic, focused reporting process, data analysis, and feedback. It requires a series of visits to designated projects, information gathering focused on key program objectives, and preparation of written reports on standardized forms that can later be assimilated into a profile of what occurs in one project, or an analysis of a particular theme or program component across all projects.

Project visits can be supplemented with periodic structured phone interviews, a survey, perhaps some affective scales or content-specific assessments, and review of relevant documents. Documenters come together several times a year to debrief, share perceptions about the various projects, and work with other team members to corroborate findings. Information gathered is coded based on pre-developed categories of relevant project processes, then entered onto a computerized, qualitative data base for future manipulation and analysis.

The identification of key focuses for documentation is a critical component of the process. For the partnership project, these might include the organizational structure of the partnership, its setting and/or purview, technical assistance, a look at other educational improvement programs at the project, level of participation by parents, teachers, and students, local cost-sharing (a requirement of the grant), and other factors which can be documented in each project.

Reporting forms are structured so the documenter is forced to summarize the status of each focus after every project visit or interview. Typically, unique project activities can be captured under existing categories on the reporting form, but a set of additional items could be generated for each project.

A good way to approach the documentation study would be to group projects in specific categories -- e.g., geographic focus, career awareness/work experience focus, subject area focus -- and select a set of "intensive" projects to be visited five or six times over a year. The remaining "non-intensive" projects would participate in all other data gathering activities.

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Project-Based Summative Evaluations

OERI might go in one of two directions to measure the effectiveness of each partnership project. The less costly approach would be to rely on the projects' individual evaluation studies, some of which promise to be quite credible. A basic assumption is that each project will be conducting an evaluation and therefore -- in some form -- maintaining records and participant files. The evaluator's role would include four key activities:

1. clarify with each project its objectives and how they will be measured;
2. provide technical assistance in the design of each project's evaluation study and data collection methods;
3. monitor the projects as they establish record keeping systems and data bases, first to ensure consistency and appropriateness, second to ensure integrity; and
4. assist in interpretation of results.

This would be a very interactive task, which would require one or two rounds of site visits each year by evaluation experts would could also provide technical assistance to school sites. It would be useful because it develops project staffs' capacity to do evaluation and relies more on the knowledge of people with direct experience in the project. The primary expenses would involve the evaluator's time and costs of ongoing communications.

A variation on this would be to arrange for group meetings of individual project evaluators two or three times per year. The benefit of meeting is that they can share with and learn from each other, as well as the OERI-contracted evaluator.

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A more labor intensive approach to individual summative evaluations would involve the evaluator collecting outcomes data from each project each year, setting up a longitudinal data base for each, conducting data analyses, and preparing evaluation reports. The evaluator would need to conduct activities one (clarifying objectives) and three (monitoring record keeping) above, and in addition do the following:

- agree on outcome measures to be used;
- develop instruments to measure outcomes;
- collect outcomes data from each project; and
- analyze and interpret results.

Such data collection and analysis is time consuming because individual data files must be checked for accuracy and missing information and new data must be added to existing files. If all 18 projects are included in this outcomes study, two full-time data analysts would be needed to establish, maintain, and manipulate the 18 data bases. In the end, there will be 18 different evaluations.

If OERI were to choose a selection of projects -- perhaps six to eight -- for summative evaluations, the cost could be less. This approach would have to be carefully thought out, so that there is a viable rationale for focusing on particular projects: the most straightforward would be to cluster projects by theme (e.g., career awareness) or focus (e.g., statewide versus school site).

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Summative Evaluation of the Overall Program

Given the broad overall goal of the Educational Partnerships Program to establish public/private alliances "to encourage excellence in education," it would be difficult to design an outcomes evaluation for the project as a whole. Before this could be done, agreement would be necessary on an operational definition for "excellence in education," the desired goal of the

project. One might also argue that "effective partnerships" is an outcome that can be measured: again, agreement would be necessary on an operational definition of effectiveness for these alliances. In effect, this would result in more specific across-the-board project objectives.

What would be necessary steps before a summative evaluation could be designed and carried out? Two major issues are evident.

The first is establishing operational definitions for "excellence in education" and/or "effective partnerships," which would indicate specific program objectives to which all projects could aspire. For example, if OERI decides that increased student achievement on standardized tests is a valid indicator of educational excellence, then all projects would have to relate their proposed activities (e.g., career awareness, internships, training in technology) directly to academic skills.

The second problem is identifying measures with which to evaluate these objectives across all projects. For example, if "effective partnerships" are measured in one way by partner satisfaction with program outcomes, all projects would have to agree to complete inventories measuring partner satisfaction. The end result of such negotiations would be a set of measures which could be taken in all projects, then analyzed across projects to determine changes in behavior resulting from the program.

One way to facilitate an overall program evaluation is to set up a computerized data base, into which information from each project could be entered. The data base could be used by the evaluator and by projects, who could key information into the central computer and get access to data whenever they require aggregated information about their site(s). Gathering and entering these data -- and hiring a data analyst to maintain and manipulate the data base -- can be quite costly.

A necessary component in an outcomes study of this type is a comparison group. The task of identifying a good number of non-project partnerships willing to participate in data collection activities is formidable, could be frustrating, and is expensive. One solution to this is to develop intra-project comparison groups, once projects are categorized into smaller groups.

The partnership projects can be categorized in a number of ways, depending on OERI priorities. Those being implemented statewide (3), for example, could be evaluated as a group. Those working at the middle school level only (4) could be evaluated as a group. Those focusing on gifted children (4) could be evaluated as a group. Those focusing on career awareness/jobs (9) or on math/science (5) could be categorized in groups. Their control groups could be students in the other project partnerships which are <u>not</u> focusing in these areas. For example, middle school students in the five projects focusing at the

secondary level could be comparison students for the four projects focusing on the middle school level.

This type of complicated design is doable. Evaluators in New York University's Health Research Program are conducting an outcomes study with these research design characteristics for the New Jersey Department of Health. Forty hospitals are participating in a demonstration project designed to alleviate the nursing shortage in New Jersey. Since the hospitals are implementing various strategies to accomplish this goal, the evaluators have grouped the hospitals into one of four strategic approaches: case management; task restructuring; computerized record keeping; or shared governance/decision making. Through a factorial design, these groups of hospitals are acting both as experimental projects for one set of analyses and as control projects for other sets of analyses. Evaluators are also conducting a process implementation study, which includes two project visits to each of the 40 hospitals. Findings from the process evaluation will assist researchers in interpreting summative evaluation results.

Plans to conduct an overall summative evaluation of the Educational Partnerships Program, perhaps modeled after the nursing study which avoids an outside comparison group, could be formulated once OERI made a decision about priorities and resources. Such a design would clearly be one way to study

differences in such variables as partnership "setting" (rural versus urban versus suburban, statewide versus district level versus school-based, etc.) and organizational structure (e.g., university administered versus business dominated). Further discussion, however, may lead to the conclusion that the basic elements necessary for such a design are not in place due to the variety of differences and geographical locations of current project projects.

Program Year Three, 1992-93

Evaluation activities developed for this program can be refined and maintained during following years. Obvious adjustments would include 1) including a handful of new projects if OERI funds them, and 2) adding new program data to longitudinal data bases, if the contracted evaluator is asked to conduct individual summative evaluations or an overall summative evaluation. The third program year would also be a good time to develop "profiles" of a small selection of projects. Such profiles could provide "up-close" looks at selected sites which exemplify the best/most interesting partnership initiatives.

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Project Profiles

The term "profile" is used here because the traditional "case study" approach may be too labor intensive and costly to conduct for the partnership program. Constructing a project profile allows more flexibility in terms of data collection and content. Documentation can greatly enrich the information gathered for a profile, thus resulting in less time on site while the profile is being developed.

OERI must decide if rich descriptions of developing partnerships, their activities, and outcomes over a three-year period will enhance an understanding of partnerships and their role in educational improvement. A decision to go ahead with a series of project profiles must be followed, probably by the end of the second project year, with a selection of projects to be profiled in year three.

A professional writer should be identified to work with the evaluators in establishing the purpose and content of each profile, and in deciding how much more information must be gathered during project visits. Although it is not necessary for the writer to conduct actual project visits, a day or two on project will provide a personal perspective on local color,

politics, personalities, and impact of the project.

Very good professional writers are capable of assimilating a large amount of information about a project, conducting a "quick study," reading "between the lines," so to speak, and writing sharply. They would, of course, have to rely on evaluators to analyze and categorize data, provide specific examples to back up assertions and conclusions, and ensure "depth" in the profile.

A SUMMARY OF OPTIONS

Program Year One, 1990-91

Tracking, program files, contact logs by sites

Structured phone interviews

Program Year Two, 1991-92

- Evaluation start-up activities
  - -Structured phone interviews

    OR

  - -Round of site visits
- Project-based formative evaluations
- Documentation of Project Implementation
- Project-based summative evaluations
  - -Conducted by sites, supervised by evaluator

    OR

  - -Conducted by evaluator
- Summative Evaluation of the Overall Program

Program Year Three, 1992-93

- Ongoing Evaluation Design
- Site Profiles

END

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